Grain Transportation Report

A weekly publication of the
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Contents

The next release is Dec. 30, '04

Agricultural Products Compete With Other Commodities For Limited Rail Capacity. The major factors contributing to limited rail capacity are an unexpectedly strong economic recovery resulting in more rail traffic, higher fuel prices and new hours-of-service regulations encouraging truck movements to go by rail, high natural gas prices encouraging the use of coal in power generation, and a huge grain harvest. In addition, U.S. railroads have fewer train crews available because—starting last year—a change in the law allows train crew members to retire earlier. The resulting lack of crews has been one of the major factors contributing to congestion on the Union Pacific (UP) and CSX Transportation (CSX).

For the 4-week period ending December 11, intermodal movements on major U.S.-owned railroads increased 12.3 percent over the same period in 2003 and non-agricultural carloads increased 3.1 percent. In contrast, grain carloads decreased 6.4 percent and other agricultural products decreased 0.5 percent. Grain car loadings during the 4 weeks ending December 11 were down for each of the four major U.S. railroads compared to the same period last year; by railroad, Burlington Northern Santa Fe was down 5.8 percent, UP was down 7.3 percent, CSX was down 7.2 percent, and Norfolk Southern was down 1.2 percent. *Marvin.Prater@USDA.gov*

"NAFTA Rail" Closer After KCS and TMM Amend Agreement. An agreement reached December 15, 2004, between Kansas City Southern (KCS) and Mexico's Grupo Transportacion Maritima Mexicana (TMM), could enable KCS to purchase a 51 percent voting interest in TMM's railway unit, Transportacion Ferroviaria Mexicana (TFM). Although this agreement remains contingent on the resolution of a tax dispute between TMM and the Mexican government, the agreement moves NAFTA Rail one step closer to becoming the first transnational railroad linking the United States and Mexico. With the combination of these two systems, NAFTA Rail will eventually operate approximately 6,350 miles of railroad. An October 6, 2004, decision by Mexico's Foreign Investment Commission allowed KCS to purchase a controlling interest in TFM.

The transaction is supported by the U.S. Department of Agriculture (USDA) since U.S. agriculture will benefit from increased railroad competition in the corridor between the Lower Plains States and Mexico, as well as from seamless rail service. Mexico has increased grain imports by 83 percent over the last 10 years, ranking it second in the import of U.S. feed grains, second in the import of U.S. soybeans and third in the import of U.S. wheat. Cross-border grain rail deliveries to Mexico during 2003 accounted for 15 percent of all U.S. grain rail deliveries to ports and export destinations, more than grain rail deliveries to the Mississippi Gulf, and Atlantic and East Gulf ports combined (see October 7, 2004 GTR). During 2004 year-to-date, U.S.-to-Mexico cross-border grain rail movements have increased by 40 percent compared to the same period in 2003 (table 3 inside). *Karl.Hacker@USDA.gov*

Exports Rise as Dollar Falls. Year-to-date grain and oilseeds inspected for export from three major U.S. port regions (Pacific, Mississippi and Texas Gulf) as of December 16, 2004, were 86.7 million metric tons (mt) compared with 81.0 million mt a year earlier (table 13 inside). Most of the increase in exports came from the Texas Gulf and PNW. By December 15, about 374,000 grain carloads were delivered to U.S. ports by rail, compared with 313,000 carloads during the same period a year ago (table 3 inside). There were increases in rail grain carloads delivered to Texas Gulf and PNW ports, and to Mexico. Recently, the dollar has been depreciating in value against major currencies and this is partly responsible for the increase in U.S. grain exports.

Ocean Freight Rates Are Declining. Ocean freight rates for shipping grains from the U.S Gulf to Japan and the PNW to Japan have continued to decline for the third week in a row. Between December 1 and December 22, U.S. Gulf rates to Japan have declined 15 percent to about $60 per mt. Similarly, PNW rates to Japan have declined 22 percent to just about $39 per mt. Exports may continue to grow if ocean freight rates continue to decline and the U.S dollar remains weak against major currencies. *Surajudeen.Olowolayemo@USDA.gov*

Grain Transportation Indicators

Table 1--Grain transport cost indicators*

	Truck	Rail	Barge	Ocean	
Week ending				Gulf	Pacific
12/22/04	133	276	192	272	281
Compared with last week	↓	↓	↑	↓	↓

*Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = nearby secondary rail market ($/car); barge = spot Illinois River basis (index = percent of tariff rate); and ocean = routes to Japan ($/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2--Market update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin--destination	12/17/2004	12/10/2004
Corn	IL--Gulf	-0.60	-0.55
Corn	NE--Gulf	-0.72	-0.71
Soybean	IA--Gulf	-0.97	-0.83
HRW	KS--Gulf	-1.06	-1.10
HRS	ND--Portland	-1.72	-1.60

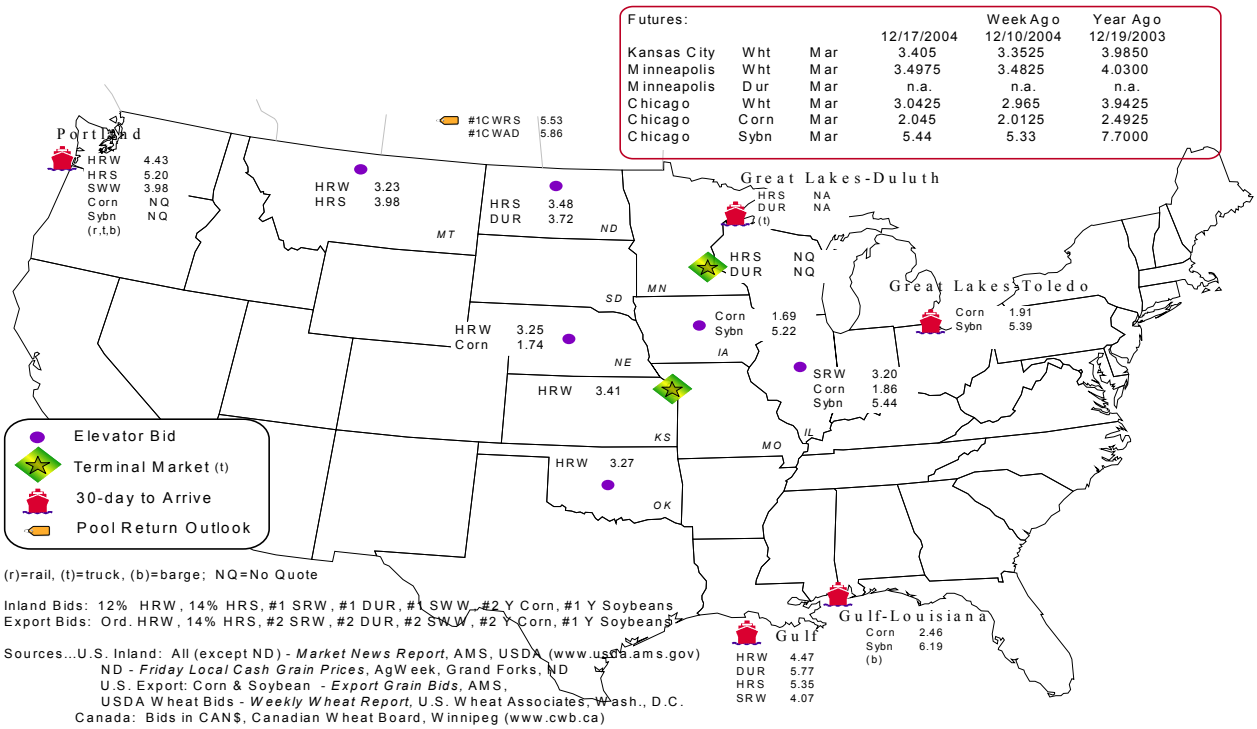
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid summary



Rail Transportation

Table 3--Rail deliveries to port (carloads)*

Week ending	Mississippi Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
12/15/2004[p]	181	1,974	2,224	3,809	468	8,656
12/08/2004[r]	150	1,318	2,400	3,484	337	7,689
2004 YTD	10,156	89,699	64,130	199,553	10,198	373,736
2003 YTD	14,568	84,268	45,336	149,879	19,189	313,240
2004 as % of 2003	70	106	141	133	53	119
Total 2003**	14,843	88,194	48,805	157,125	20,509	329,476
Total 2002	12,247	83,969	40,867	110,471	20,938	268,492

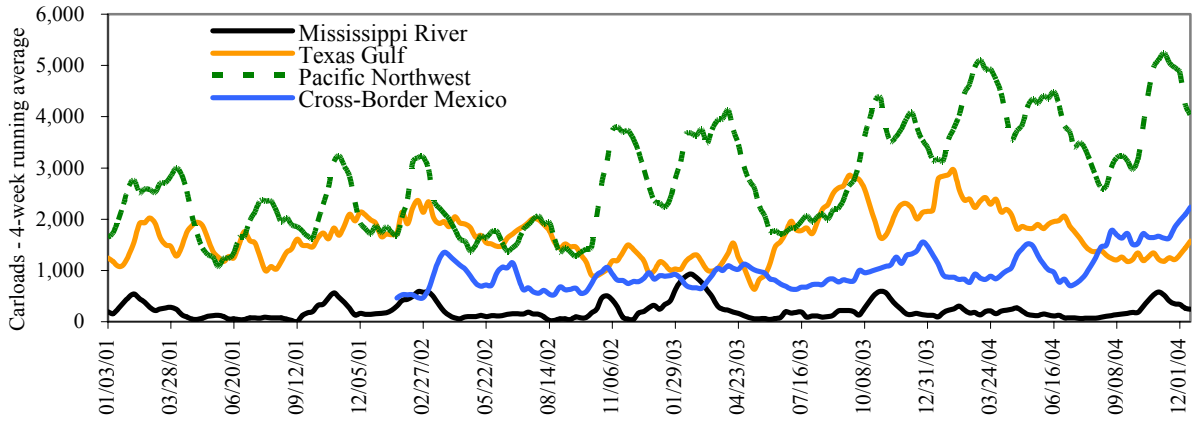
(*) Incomplete Data; as of 9/22/04, Cross-Border movements included; (**) Excludes 53rd week;YTD = year-to-date; p = preliminary data; r = revised data

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 40 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

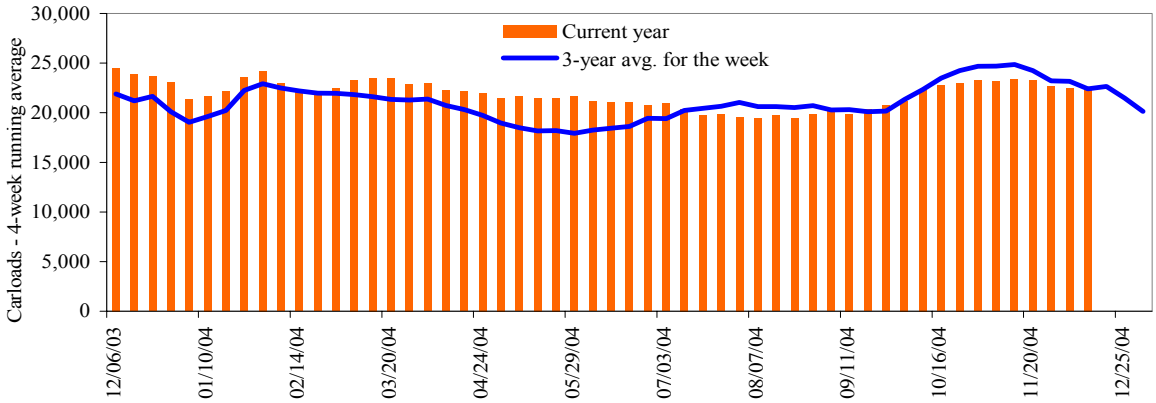
Rail deliveries to port



Source: Transportation & Marketing Programs/AMS/USDA

Figure 3

Total weekly U.S. grain car loadings for Class I railroads



Source: Association of American Railroads

Table 4--Class I rail carrier grain car bulletin (grain carloads originated)

	East		West			U.S. total	Canada	
Week ending	CSXT	NS	BNSF	KCS	UP		CN	CP
12/11/04	3,478	3,713	9,163	577	6,374	23,305	5,185	5,898
This week last year	3,392	3,197	9,687	544	6,587	23,407	5,204	4,535
2004 YTD	135,448	161,514	433,137	26,081	312,437	1,068,617	225,069	199,760
2003 YTD	138,583	162,479	391,805	22,656	318,322	1,033,845	186,280	188,330
2004 as % of 2003	98	99	111	115	98	103	121	106
Total 2003*	146,395	171,260	416,371	24,506	336,079	1,094,611	197,993	198,185

Source: Association of American Railroads (www.aar.org); YTD = year-to-date; * Excludes 53rd week

Table 5--Rail car auction offerings, week ending 12/18/04 ($/car)*

Delivery for:	Feb. 05	Mar. 05	Apr. 05
BNSF[1]			
COT/N. grain	no offer	$6	no offer
COT/S. grain	no offer	$51	$23
UP[2]			
GCAS/Region 1	no offer	$142	no offer
GCAS/Region 2	no offer	$75	no offer

*Average premium/discount to tariff, last auction

[1]BNSF - COT = Certificate of Transportation

N includes: ID, MN, MT, ND, OR, SD, WA, WI, WY, and Manitoba, Canada.

S includes: CO, IA, IL, KS, MO, NE, OK, TX, NM, AZ, CA, UT, and NV.

[2]UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

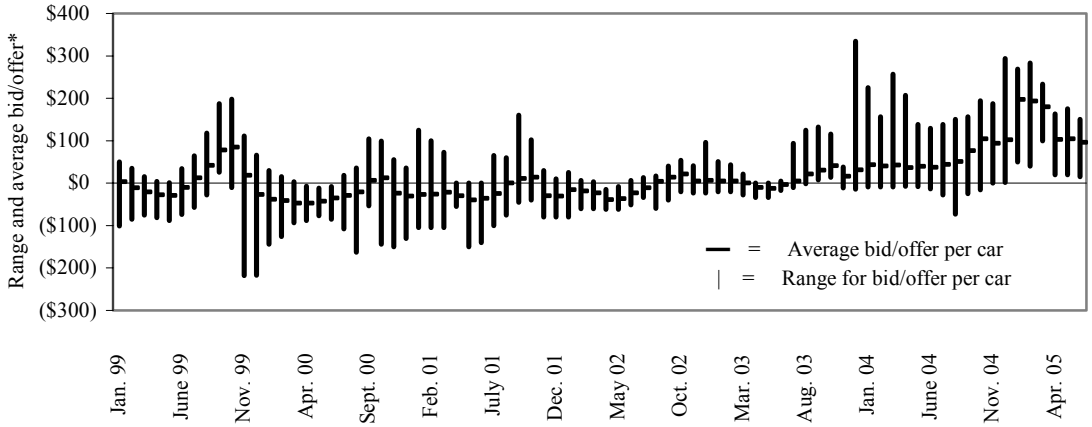
Source: Transportation & Marketing Programs/AMS/USDA

Rail service may be ordered directly from the railroad via **auction** for guaranteed service or tariff for nonguaranteed service or through the secondary market.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

Secondary rail car market, delivery month-year



*up to 6 months of trading

Source: Transportation & Marketing Programs/AMS/USDA

Average bid/offer is the simple average of all the weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Range for bid/offer shows the range of average weekly bids/offers over the entire period (up to 6 months) for guaranteed railcars that are traded for delivery in a particular month.

Table 6--Weekly secondary rail car market, week ending 12/17/04 ($/car)*

	Delivery period			
	Jan. 05	**Feb. 05**	**Mar. 05**	**Apr. 05**
BNSF-GF	$183	$175	$150	$20
Change from last week	-$55	-$25	-$33	-$43
UP-Pool	$179	$160	$128	$138
Change from last week	-$46	-$48	-$64	$13

*Average premium/discount to tariff, $/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
Missing value = no bid quoted; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7--Tariff rail rates for unit and shuttle train shipments*

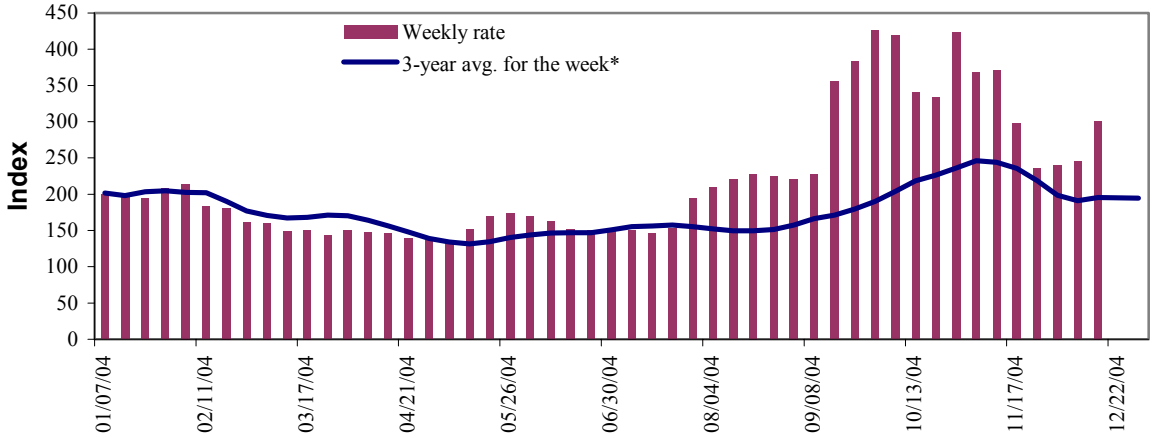
Effective date: 12/6/2004	Origin	Destination	Rate/car	Rate/metric ton	Rate/bushel**
Unit train*					
Wheat	Minneapolis, MN	Houston, TX	$2,120	$23.37	$0.64
	Kansas City, MO	Galveston, TX	$1,920	$21.16	$0.58
	Minneapolis, MN	Portland, OR	$4,148	$45.72	$1.24
	St. Louis, MO	Houston, TX	$2,145	$23.64	$0.64
	Kansas City, MO	Laredo, TX	$2,380	$26.23	$0.71
	Chicago, IL	Albany, NY	$1,834	$20.22	$0.55
	Chicago, IL	Richmond, VA	$2,002	$22.07	$0.60
Corn	Minneapolis, MN	Portland, OR	$3,600	$39.68	$1.01
	Chicago, IL	Baton Rouge, LA	not available	$0.00	$0.00
	Council Bluffs, IA	Baton Rouge, LA	$2,270	$25.02	$0.64
	Evansville, IN	Raleigh, NC	$1,791	$19.74	$0.50
	Council Bluffs, IA	Stockton, CA	$3,606	$39.75	$1.01
	Kansas City, MO	Dalhart, TX	$1,965	$21.66	$0.55
	Columbus, OH	Raleigh, NC	$1,700	$18.74	$0.48
	Des Moines, IA	Laredo, TX	not available	$0.00	$0.00
Soybeans	Minneapolis, MN	Portland, OR	$3,610	$39.79	$1.08
	Chicago, IL	Baton Rouge, LA	not available	$0.00	$0.00
	Council Bluffs, IA	Baton Rouge, LA	not available	$0.00	$0.00
	Des Moines, IA	Laredo, TX	not available	$0.00	$0.00
	Evansville, IN	Raleigh, NC	$1,791	$19.74	$0.54
	Chicago, IL	Raleigh, NC	$2,391	$26.36	$0.72
Shuttle Train*					
Wheat	St. Louis, MO	Houston, TX	$1,895	$20.89	$0.57
	Minneapolis, MN	Portland, OR	$3,993	$44.01	$1.20
Corn	Fremont, NE	Houston, TX	$2,665	$29.38	$0.75
	Minneapolis, MN	Portland, OR	$3,450	$38.03	$0.97
Soybeans	Council Bluffs, IA	Houston, TX	$2,605	$28.71	$0.73
	Minneapolis, MN	Portland, OR	$3,410	$37.59	$0.95

*A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of more than 100 cars that meet railroad efficiency requirements.

**Approximate load per car = 100 short tons: corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Figure 5
Illinois River barge rate index - quotes



Note: Index = percent of tariff rate; *4-week moving average
Source: Transportation & Marketing Programs/AMS/USDA

The **Illinois River barge rate index** averaged 183 percent of the **benchmark tariff rates** between 1999 and 2001, based on weekly market quotes. The **index**, along with **rate quotes** and **futures market** bids are indicators of grain transport supply and demand.

Table 8--Barge rate quotes: southbound barge freight

Location	12/15/2004	12/8/2004	Jan '05	Mar '05
Twin Cities	0	0	0	0
Mid-Mississippi	318	245	0	225
Illinois River	301	245	278	219
St. Louis	277	198	220	186
Lower Ohio	279	202	228	195
Cairo-Memphis	267	180	205	171

Index = percent of tariff, based on 1976 tariff benchmark rate
Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:
(Index * 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 6).

Note: The Illinois barge rate is for Beardstown, IL, La Grange Lock & Dam (L&D 8).

Figure 6
Benchmark tariff rates

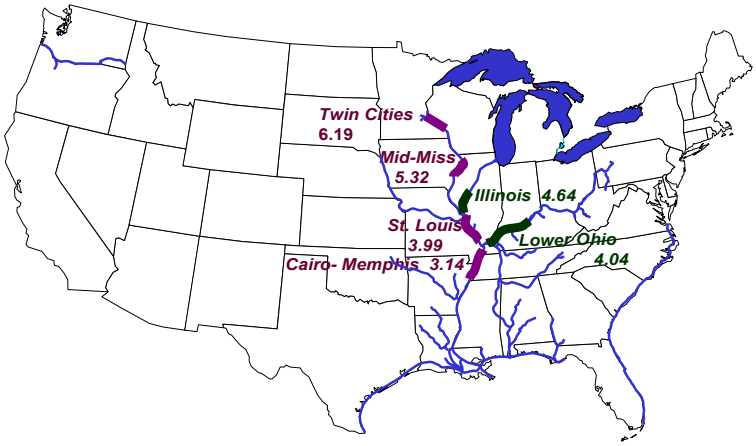
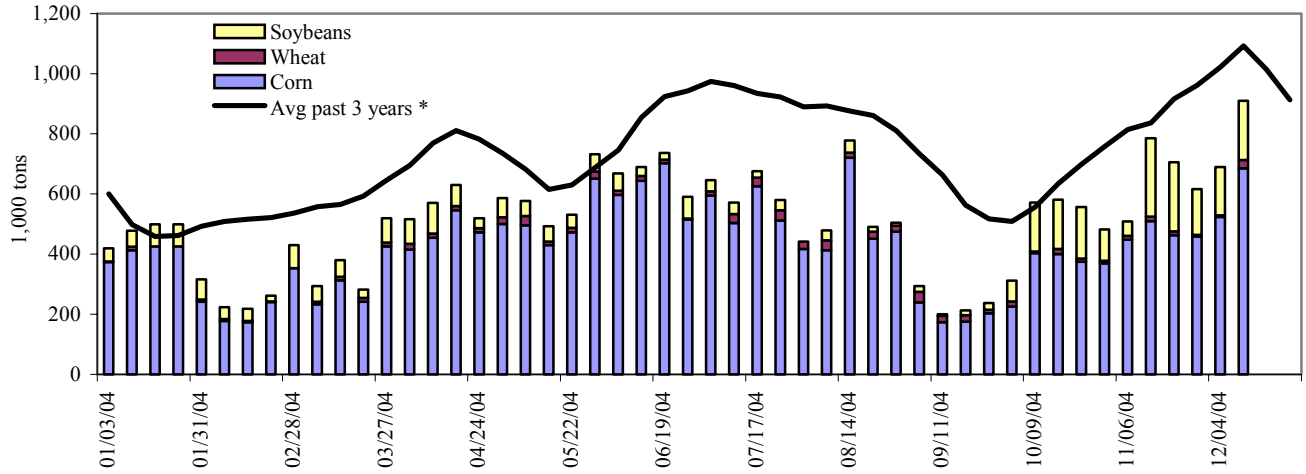


Figure 7

Barge movements on the Mississippi River (Locks 27 - Granite City, IL)



* 4-week moving average

Source: Transportation & Marketing Programs/AMS/USDA

Table 9--Barge grain movements (1,000 tons)

Week ending 12/11/2004	Corn	Wheat	Soybean	Other	Total
Mississippi River					
Rock Island, IL (L15)	149	0	43	14	206
Winfield, MO (L25)	311	5	108	30	453
Alton, IL (L26)	702	25	198	30	954
Granite City, IL (L27)	685	28	197	29	938
Illinois River (L8)	307	16	71	0	394
Ohio River (L52)	78	9	61	0	148
Arkansas River (L1)	0	16	16	0	31
2004 YTD	24,681	2,623	6,007	748	34,059
2003 YTD	28,665	2,688	8,898	636	40,887
2004 as % of 2003 YTD	86	98	68	118	83
Total 2003	29,898	2,787	9,146	695	42,526

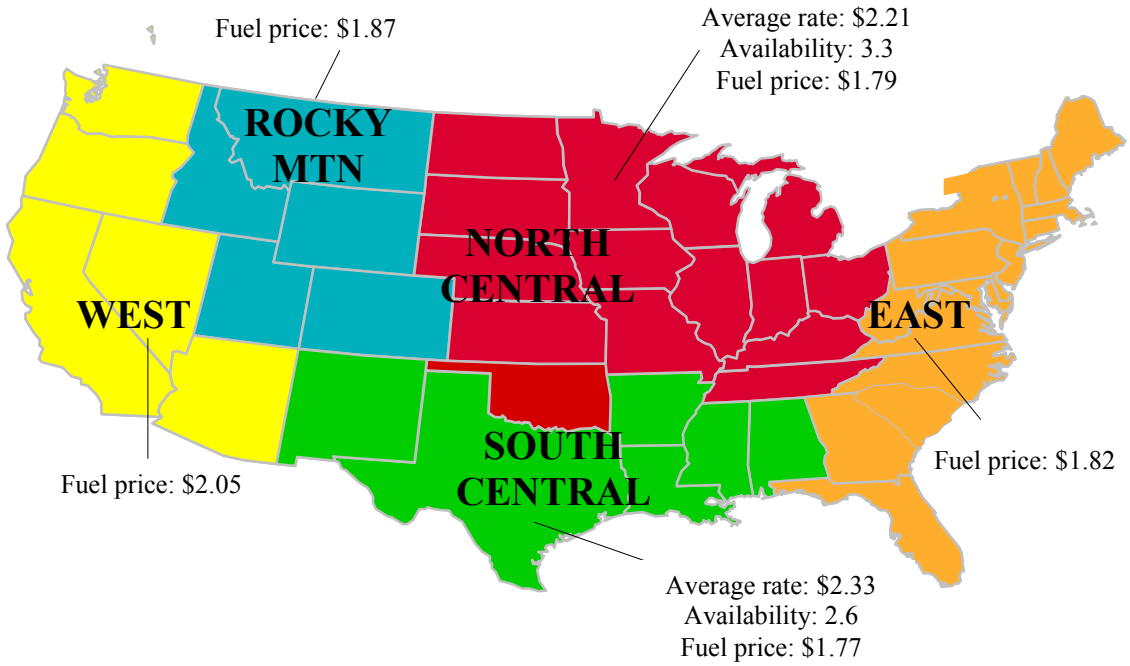
YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1. "Other" refers to oats, barley, sorghum, and rye.

Source: U.S. Army Corp of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webrpts/default.asp)

Note: Total may not add exactly, due to rounding

Truck Transportation

Figure 8
U.S. grain truck market advisory, 3rd quarter 2004*



*Average rate per loaded mile, based on truck rates for trips of 25, 100, and 200 miles
Note: Fuel prices are a quarterly average (unit per gallon)
Fuel price data source: Energy Information Administration, U.S. Department of Energy, www.eia.doe.gov

Table 10--U.S. grain truck market overview, 3rd quarter 2004

Region/commodity*	25 miles	100 miles	200 miles	Truck availability	Truck activity	Future truck activity
	Rate per mile			*Rating compared to same quarter last year* 1=Very easy to 5=Very difficult	1=Much lower to 5=Much higher	
National average[1]	**2.76**	**2.12**	**1.87**	**3.1**	**3.4**	**3.2**
North Central region[2]	2.76	2.02	1.86	3.3	3.3	3.3
Corn	2.90	2.15	2.18	2.8	2.9	3.1
Wheat	2.43	1.92	1.68	3.6	3.5	3.3
Soybean	2.90	2.15	2.18	2.9	2.9	2.9
South Central region[2]	2.97	2.14	1.87	2.6	3.8	2.9
Corn	2.32	2.12	1.76	3.0	3.8	3.0
Wheat	3.07	2.05	1.81	2.7	3.8	3.0
Soybean	3.35	2.26	2.05	2.2	3.6	2.6

Rates are based on trucks with 80,000 lb weight limit
*Commodity averages based on truck rates for top producing states based on National Agricultural Statistics Service/USDA
[1]National average includes: AR, CO, IA, IL, IN, KS, LA, MN, MS, ND, NE, OH, OK, OR, SD, TX, and WA.
[2]Commodity rates per mile include the average of the top 3 producing states within the region.
Source: Transportation and Marketing Programs/AMS/USDA

The weekly **diesel price** provides a proxy for trends in U.S. truck rates. Diesel fuel is a significant expense for truck grain movements, accounting for 37 percent of the estimated variable cost.

Table 11--Retail on-highway diesel prices*, week ending 12/20/04 (US$/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	2.052	-0.011	0.537
	New England	2.199	-0.007	0.550
	Central Atlantic	2.171	-0.013	0.550
	Lower Atlantic	1.988	-0.010	0.531
II	Midwest	1.944	-0.009	0.468
III	Gulf Coast	1.922	0.012	0.465
IV	Rocky Mountain	1.988	-0.061	0.461
V	West Coast	2.047	-0.050	0.412
	California	2.087	-0.051	0.406
Total	U.S.	1.984	-0.013	0.480

*Diesel fuel prices include all taxes.

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Grain Exports

Table 12--U.S. export balances (1,000 metric tons)

	Wheat						Corn	Soybeans	Total
Week ending 1/	HRW	SRW	HRS	SWW	DUR	All wheat			
12/9/2004	1,498	514	1,255	749	74	4,088	8,113	5,780	17,981
This week year ago	3,183	658	1,336	1,249	202	6,628	10,319	7,816	24,763
Cumulative exports-crop year 2/									
2004/05 YTD	5,347	2,171	4,485	2,942	366	15,312	13,423	11,667	40,402
2003/04 YTD	6,435	2,145	3,744	2,181	654	15,159	13,312	11,737	40,208
2004/05 as % of 2003/04	83	101	120	135	56	101	101	99	100
2003/04 Total	12,697	3,785	6,928	4,889	1,053	29,353	47,704	24,102	101,159
2002/03 Total	6,896	2,899	6,645	3,517	720	20,677	39,646	28,908	89,231

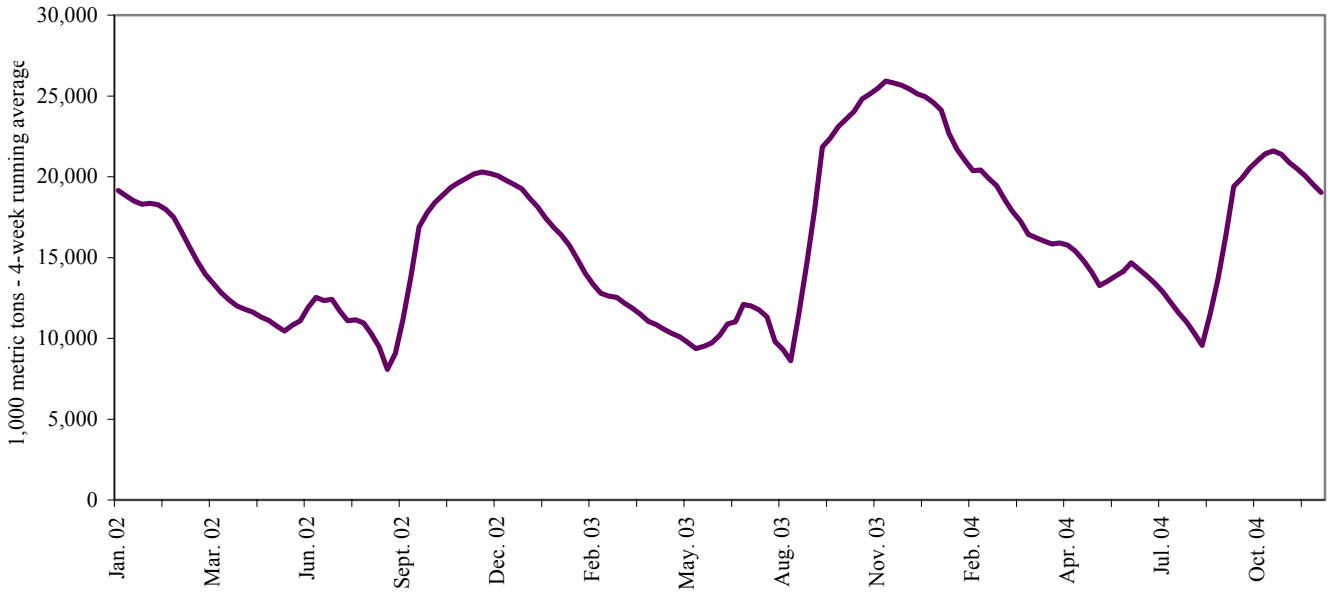
Note: YTD = year-to-date. Crop year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31, 1/ = Current outstanding unshipped export sales to date

2/ = New crop year in effect for corn and soybean sales

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Figure 9

U.S. grain, unshipped export balance, including wheat, corn, and soybean sales



Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13--Select U.S. port regions - grain inspections for export (1,000 metric tons)

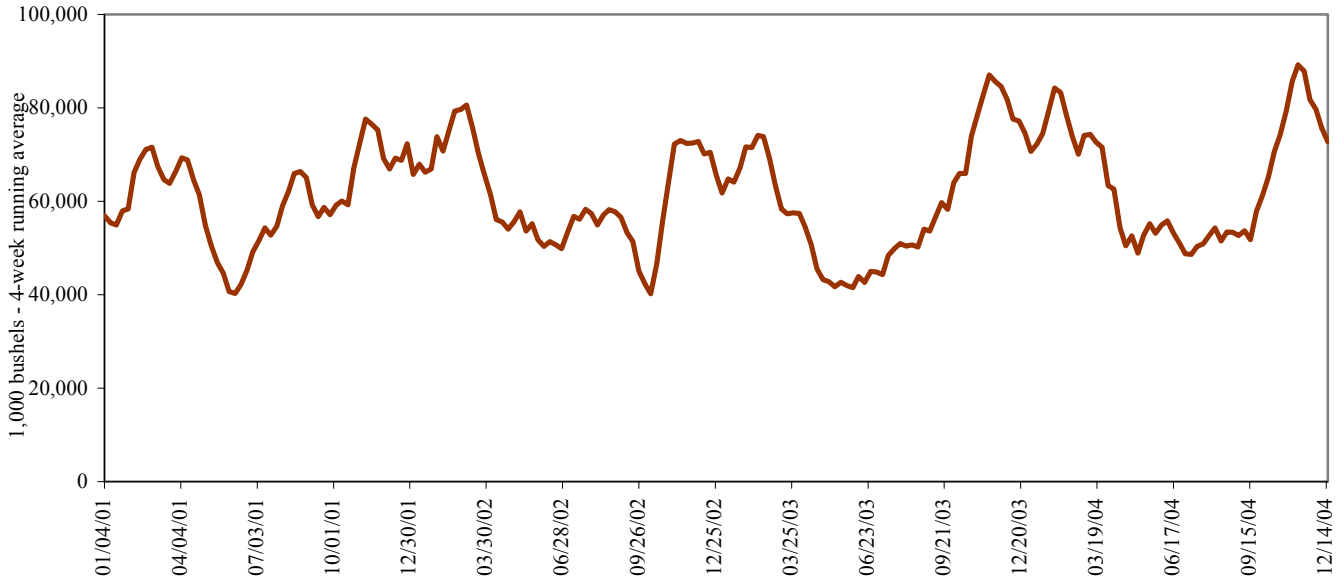
	Pacific Region			Mississippi Gulf			Texas Gulf			Port Region total		
Week ending	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Wheat	Corn	Soybeans	Pacific	Mississippi	Texas
12/16/04	209	173	189	111	647	669	44	13	0	571	1,427	57
2004 YTD	11,699	9,434	4,411	7,013	31,768	14,508	7,702	125	18	25,544	53,289	7,845
2003 YTD	8,578	5,280	5,141	5,812	30,248	18,923	6,680	229	69	18,999	54,983	6,977
2004 as % of 2003	136	179	86	121	105	77	115	55	27	134	97	112
2003 Total	8,764	5,450	5,141	5,883	30,903	19,374	7,011	229	69	19,355	56,160	7,309

Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa); YTD: year-to-date

The United States exports approximately one-quarter of the grain it produces. On average, it includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Over 60 percent of these U.S. export grain shipments departed through the Mississippi Gulf region in 2003.

Figure 10

U.S. grain inspected for export (wheat, corn, and soybeans)



Source: Federal Grain Inspection Service/USDA (www.usda.gov/gipsa)

Ocean Transportation

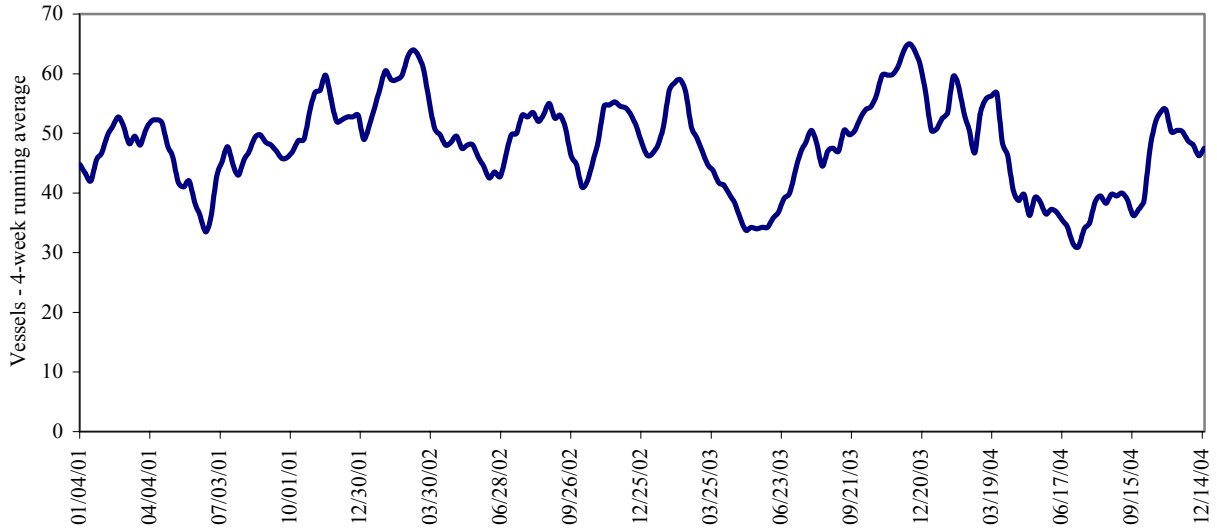
Table 14--Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
12/16/2004	37	54	75	9	4
12/9/2004	28	44	75	9	6
2003 range	(11..47)	(30..76)	(39..93)	(3..13)	(1..15)
2003 avg.	31	49	62	9	6

Source: Transportation & Marketing Programs/AMS/USDA

Figure 11

Gulf Port grain vessel loading (past 7 days)



Source: Transportation & Marketing Programs/AMS/USDA

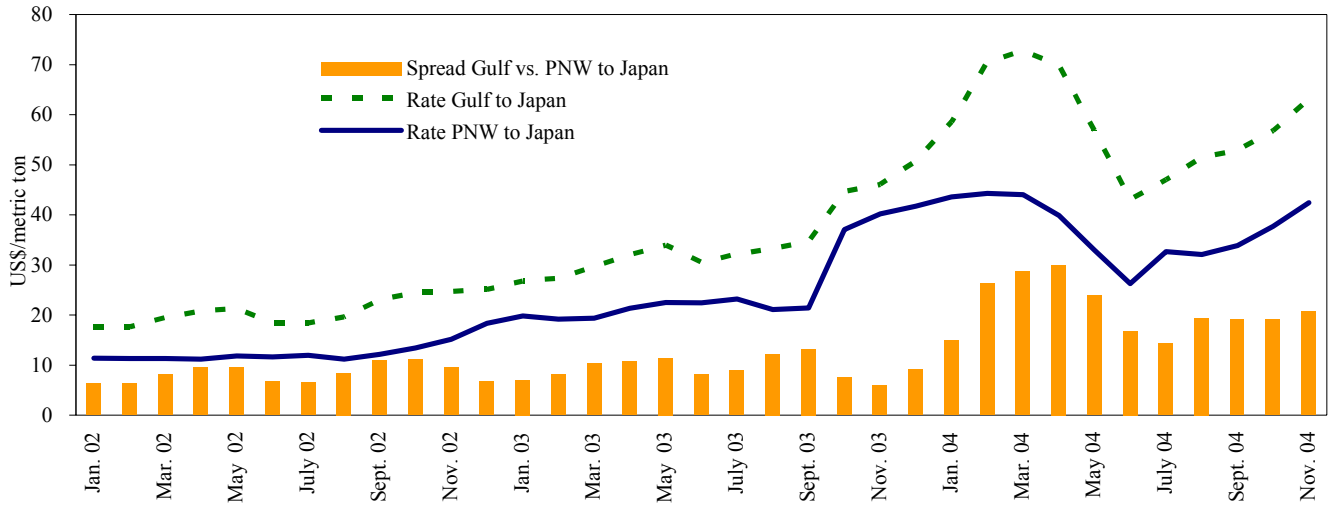
Table 15--Quarterly ocean freight rates (average rates & percentage changes) (US$/metric ton)

Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change	Countries/ regions	2004 3rd qtr	2003 3rd qtr	Percent change
Gulf to				**Pacific NW to**			
Japan	$50.08	$33.83	48	Japan	$37.00	---	---
China	$54.00	$34.00	59				
N. Europe	---	$22.88	---	**Argentina/Brazil to**			
N. Africa	---	$25.50	---	Med. Sea	$46.92	$24.50	92
Med. Sea	---	$24.88	---	China	---	$34.75	---

Source: Maritime Research, Inc. (www.maritime-research.com)

Figure 12

Grain vessel rates, U.S. to Japan



Source: Baltic Exchange (www.balticexchange.com)

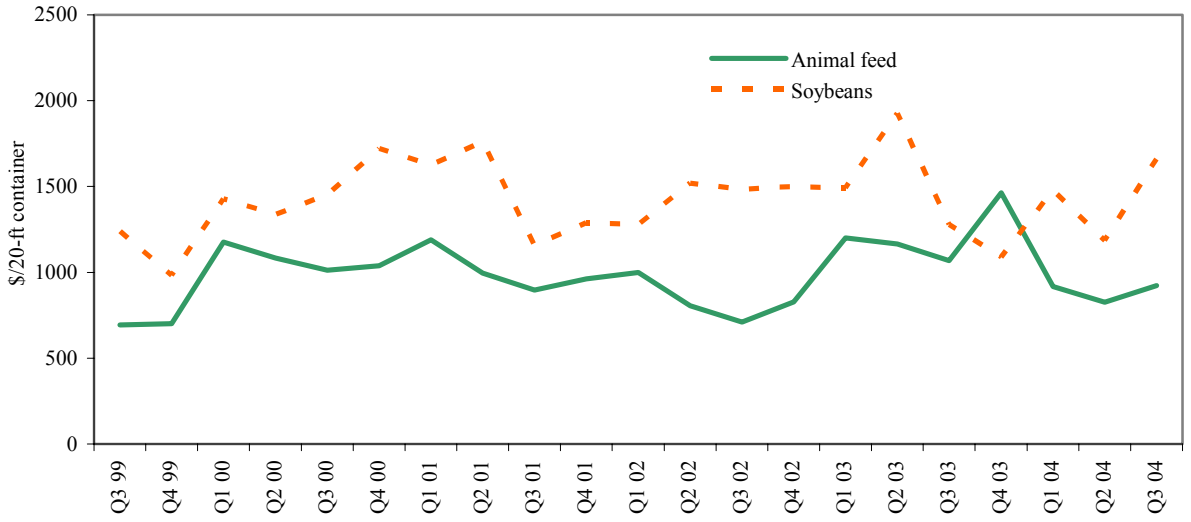
Table 16--Ocean freight rates for selected shipments, week ending 12/18/04

Export region	Import region	Grain	Month	Volume loads (metric tons)	Freight rate ($/metric ton)
U.S. Gulf	Belgium	Hvy Grain	Dec 10/17	40,000	38.00
U.S. Gulf	Japan	Hvy Grain	Nov 25/30	54,000	59.00
U.S. Gulf	China	Hvy Grain	Dec 27/30	55,000	63.00
U.S. Gulf	Japan	Hvy Grain	Dec 1/10	54,000	62.50
Norfolk	Latvia*	Wheatflour	Dec 10/25	3,320	65.00

Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option
*Most food aid from the United States is required to be shipped on U.S. flag vessels. The vessels are limited in availability resulting in higher rates. In addition, destinations receiving food aid generally lack adequate port unloading facilities, requiring the vessel to remain in port for a longer duration than normal.
Source: Maritime Research Inc. (www.maritime-research.com)

Figure 13

Weighted average rates[1] for containerized shipments of animal feed and soybeans to selected Asian countries



[1]Animal Feed: Busan-Korea (15%), Kaohsiung-Taiwan (21%), Tokyo-Japan (39%), Hong Kong (22%), Bangkok-Thailand (3%) and soybeans: Busan-Korea (5%), Keelung-Taiwan (31%), Tokyo-Japan (64%)

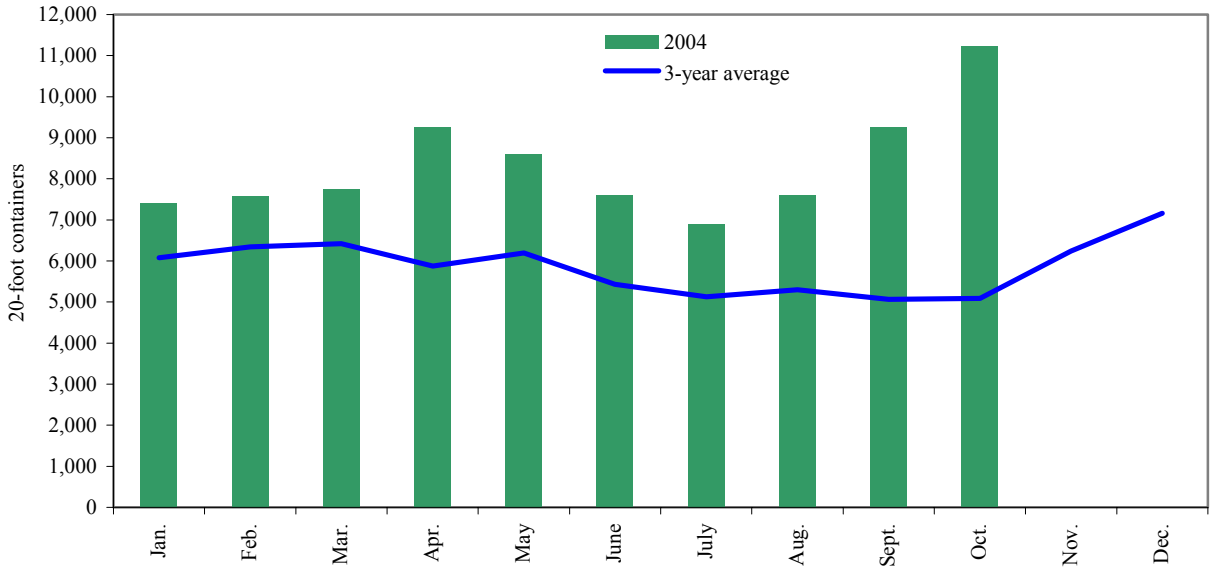
Quarter 3, 2004.

Source: Ocean Rate Bulletin, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

Figure 14

Monthly shipments of containerized grain for 2004 compared with a 3-year average



Note: PIERS data is available with a lag of approximately 40 days

Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

Contacts and Links

Contact Information

Coordinator		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 690-1328
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 690-1328
Rail		
Marvin Prater	marvin.prater@usda.gov	(202) 690-6290
Johnny Hill	johnny.hill@usda.gov	(202) 720-4211
Barge Transportation		
Karl Hacker	karl.hacker@usda.gov	(202) 690-0152
Nicholas Marathon	nick.marathon@usda.gov	(202) 690-0331
Truck Transportation		
Karl Hacker	karl.hacker@usda.gov	(202) 690-0152
John Batson	john.batson@usda.gov	(202) 690-1312
Grain Exports		
Johnny Hill	johnny.hill@usda.gov	(202) 720-4211
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 690-1328
April Taylor (Container rates)	april.taylor@usda.gov	(202) 690-1326
Johnny Hill (Vessels)	johnny.hill@usda.gov	(202) 720-4211

Subscription Information: To subscribe to the GTR for a weekly email copy, please contact Deen Olowolayemo at surajudeen.olowolayemo@usda.gov or 202-690-1328 (1303) *(printed copies are also available upon request)*.

Related Websites

Agricultural Container Indicators	http://www.ams.usda.gov/tmd2/agci/
Ocean Rate Bulletin	http://www.ams.usda.gov/tmd/Ocean/index.asp